

International Forms Application Administrator Training v1.0

August 2023

Agenda

- Module 1: iForms Introduction and Overview
- Module 2: State Administrator
- Module 3: OCSS Administrator
- Questions

Training Resource

- *iForms Navigation Guide* is a complete guide to iForms for caseworkers, managers, and administrators.
- Available June 2023

Child Support Portal Navigation Guide for iForms

ADMINISTRATION FOR
CHILDREN & FAMILIES

Office of Child Support Services
330 C Street SW, 5th Floor
Washington DC 20201

June 2023
Version 1.0

Module 1: iForms Introduction and Overview

International Forms – Child Support Portal

The screenshot shows the Child Support Portal homepage. At the top, the header reads "CHILD SUPPORT PORTAL" with the tagline "Secured Environment" below it. A navigation bar contains links: "SECURE HOME", "--SELECT APPLICATION--" (with a dropdown arrow), "FEEDBACK", "FAQ", "CONTACT US", and "COMMUNICATION CENTER". The dropdown menu for "--SELECT APPLICATION--" is open, listing several options: "Communication Center", "Electronic Document Exchange", "Federal Collection and Enforcement", "Intergovernmental Reference Guide", "International Forms" (highlighted with a red box), "Locate", "Query Interstate Cases for Kids", and "State Plan". The main content area includes a "Welcome" message, an "In The Spotlight" section with a yellow background and a spotlight icon, and a section titled "Application" with a description "Your state has access to the following applications:". Below this, there are icons and labels for "Communication Center", "eEmployer", "DoD Entitlement", and "Electronic Document Exchange". To the right of the "Application" section, there is a "Communications" section with a "New" label and a large blue "0".

CHILD SUPPORT PORTAL
Secured Environment

SECURE HOME --SELECT APPLICATION-- FEEDBACK FAQ CONTACT US COMMUNICATION CENTER

Welcome to the Child Support Portal

The Child Support Portal provides services to assist authorized users with case processing, document exchange, and other services. You may view the application list on the --Select Application-- tab in the navigation bar.

In The Spotlight

Application

Your state has access to the following applications:

- Communication Center
- eEmployer
- DoD Entitlement
- Electronic Document Exchange

Hover over the applications for a description.

Your state **COULD have access** to the following applications:

Communications

New

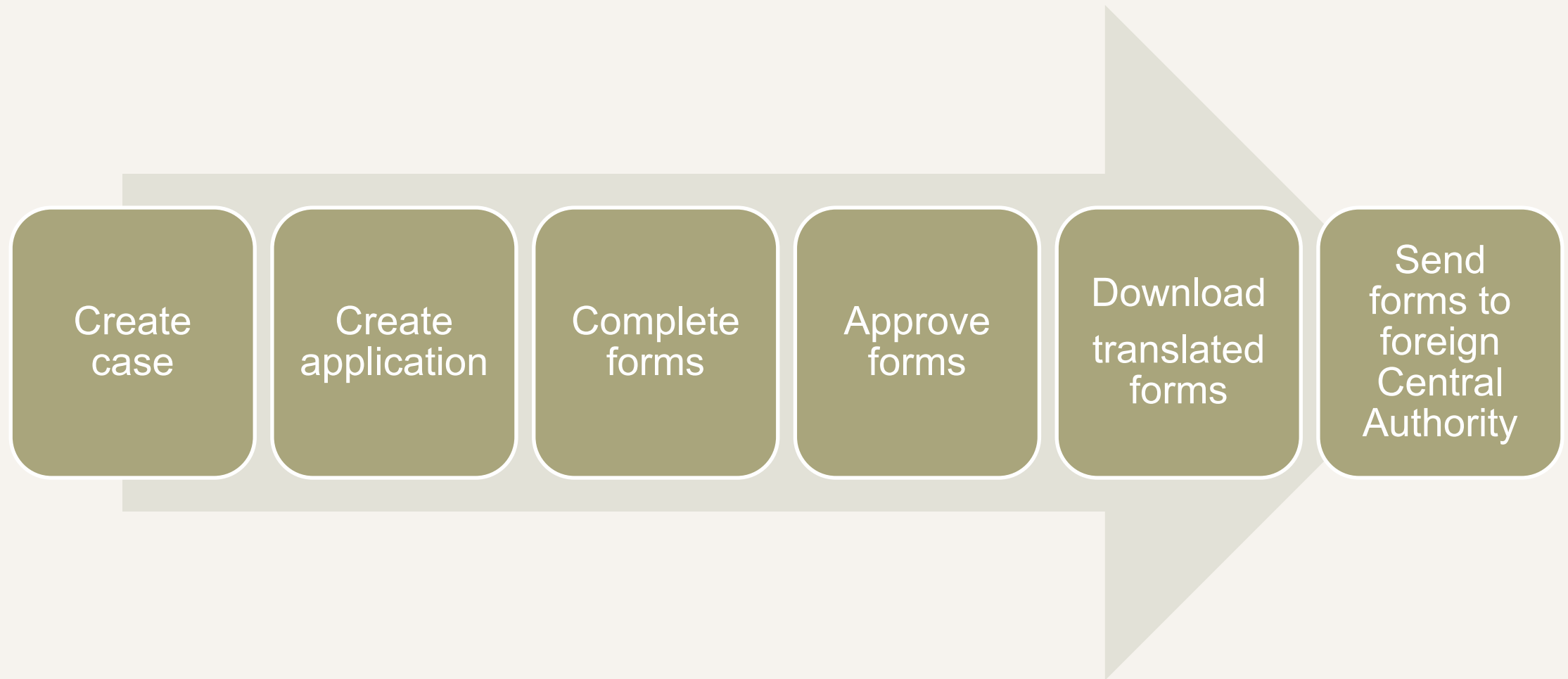
0

iForms Introduction and Overview

- iForms:
 - Tool for creating the required forms for international case applications with 2007 Hague Convention child support partners
 - Available for all state child support caseworkers
 - No state programming is required
 - Manages child support services application forms
 - Not the system of record for a case
- State case management system:
 - System of record for all cases and all actions taken on a case
 - Forms generated in iForms are added to the state system according to state policy.
- In production since June 2023

[Child Support Portal Navigation Guide for iForms – Section 2.1]

iForms Workflow



iForms Design

- Follows familiar processes for caseworkers – create a case, choose an application, and complete forms
- Caseworkers are presented with only the specific forms for the selected application type.
- Data is prepopulated in forms; required fields are marked with a red asterisk.
- Data that appears in multiple forms is entered once and populates all forms:
 - Examples: Parties' names, date of birth, address
- Data used in all forms is maintained by the State/OCSS administrator and prepopulates forms:
 - Examples: State office address, SDU information, foreign Central Authority address
- Forms are available in multiple languages.
- Flexible to accommodate state preferences and various approaches to case management – for example, individual case assignment or team-based case management

iForms Home Page

- Home page is specific to the user's role in iForms
- Supports individual assignment of cases or team-based assignment
- Administrators have a different home page.

CHILD SUPPORT PORTAL
Secured Environment

SECURE HOME INTERNATIONAL FORMS FEEDBACK CONTACT US

Home Resources Guide

My iForms Profile

First Name: John iForms Email: jsmith@abc.com
Last Name: Smith iForms Phone: 411516419
Languages: English, French Office Address: 382 Main St., Baltimore, MD, 29312

My Cases All Cases

My Cases

State Case Id	CP Last Name	NCP Last Name	Foreign CA	Assigned Caseworker/Team	Action
202107155	Peterson	Peterson	France	Maryland State Central Authority Team	Delete
20210628	Dave	Dave	Guyana	Maryland State Local Child Support Office Team	Delete
Incoming RSM	Doe	Doe	France	Maryland State Central Authority Team	Delete
202107122	Doe	Doe	France	Maryland State Central Authority Team	Delete

Create New Case

Caseworker home page

Introduction and Overview of iForms – Create Case

Create Case

BEFORE YOU BEGIN

You will need:

- State case ID
- Custodial parent and noncustodial parent names and addresses (or you can choose address unknown)
- If application is being brought by a public body: the name, address, phone number, email, and a contact name
- Names of all children and their dates of birth
- Foreign country name
- Whether a determination of nondisclosure should be made for the case

Additional information that is useful but not required. (You can add this later)

- Custodial parent and noncustodial parent date of birth
- Personal identification number for (SSN or another country's identifier for the custodial and noncustodial parent)

*The address and contact information for the Foreign Authority will be populated after you choose the foreign country

Step 1 of 5: Enter case overview information

Caseworker/Team

local maryland team

Office Address

333 Memory Lane, Suite 301, 3rd Floor, Annapolis, MD 21401, US

Respond to Incoming Request for Specific Measures

☐

* State Case ID

Next

Cancel

Step 1: Creating a case

Review Case Details and Create Case

Overview

Caseworker/Team: local maryland team
Office Address: 2345 Middle River Road, Middle River, MD, 21220, US
State Case Id: MD88888888
Determination of Nondisclosure: No

Non Custodial Parent

Name: Bruce Wayne
Date of Birth: 05/10/1977
Address Type: unknown

Children

Child 1

Name: Damian Wayne
Date of Birth: 10/15/2008
Parentage: Established or Presumed

Case details page

Custodial Party

Name: Julia Pennyworth
Date of Birth: 04/28/1978
Address Type: state office
Address: 13 Uptown St, Down Town, MD, 28100, US
Phone: +1 4563936563

Foreign CA

Foreign CA Office: France Primary office
Foreign CA Address: TestAddresslane1, Test city, FR
Phone: +33 123456789
Fax: 987654321
Email: france@france.com
Contact: Lastname Firstname

Previous

Create Case

Cancel

Introduction and Overview of iForms – Create Application

Create Application

Step 1 of 4: Enter applicant/respondent information

Custodial Party

Virginia Pepper Potts

☒ Applicant ☐ Respondent

Noncustodial Party

Tony Stark

☐ Applicant ☒ Respondent

Child is the applicant (incoming application only)

☐

* Available Applications (Choose One)

-- Select --

Next

Cancel

Application details page

Review application details and create application

Application

Applicant:

Virginia Pepper Potts

Respondent:

Tony Stark

Child is the applicant (incoming application only):

No

Application Type:

Enforcement - outgoing

Support requested

Child support

Child 1

Name:

Anthony Potts-Stark

Date of Birth:

05/29/2002

Support requested:

Yes

Spousal support

Support requested for this applicant as well as children:

No

Order details

NCP appeared or was served:

No

Additional information

Local Child Support Office Address

Local child support office:

Local Child Support Office (MD2)

Local child support office address:

2345 Middle River Road, Middle River, MD

Case Payment Information

Case reference number for electronic payments:

MD77777777

Case reference number for checks:

MD77777777

Previous

Create Application

Cancel

Create applications page

Introduction and Overview of iForms – Complete Forms

Forms

<input type="checkbox"/>	Form	Required or Optional	
<input type="checkbox"/>	EN03 - Application for Enforcement of a Decision or Recognition in Requested State	Required	Re
<input type="checkbox"/>	EN07 - Financial Circumstances +	Required	Ne
<input type="checkbox"/>	EN16 - Transmittal form under Article 12(2)	Required	In

Request ApprovalCancel

Required forms section

Prepopulated form example

OMB Control No: 0970-0488

Expiration date: XX/XX/XXXX

Convention on the International Recovery of Child Support and Other Forms of Family Maintenance

Application for Enforcement of a Decision Made or Recognized in the Requested State (Article 10(1) b))

CONFIDENTIALITY AND PERSONAL DATA PROTECTION NOTICE

Personal data gathered or transmitted under the Convention shall be used only for the purposes for which it was gathered or transmitted. Any authority processing such information shall ensure its confidentiality, in accordance with the law of its State.

An authority shall not disclose or confirm information gathered or transmitted in application of this Convention if it determines that to do so could jeopardise the health, safety or liberty of a person in accordance with Article 40.

☐ A determination of non-disclosure has been made by a Central Authority in accordance with Article 40. If this box is ticked, information under sections 2 d, e, f and g and 5 should only be provided in the Restricted Information on the Applicant page of this form.

- * Requesting Central Authority file reference number: MD77777777
- * Particulars of the applicant
 - Family name(s): Potts
 - Given name(s): Pepper Virginia
 - Date of birth¹: 10/04/1972 (dd/mm/yyyy)
 - or
Name of the public body:
 - Family name(s) of the contact person:
 - Given name(s) of the contact person:
 - and
Address: 2345 Middle River Road,
Middle River, MD, 21220, US
 - Telephone numbers: +1 5551234567
 - Fax number:
 - E-mail: mdcseuser2@mdcse.org
- Particulars of the person(s) for whom maintenance is sought or payable
 - ☒ * Maintenance is sought or payable for the applicant named above
Maintenance basis:
 - ☒ parentage ☐ in loco parentis or equivalent relationship
 - ☐ marriage ☐ analogous relationship to marriage
 - ☐ affinity (please identify):
 - ☐ grandparent ☐ sibling ☐ grandchild
 - ☐ other

PAPERWORK REDUCTION ACT OF 1996 (Pub. L. 104-13) STATEMENT OF PUBLIC BURDEN: The purpose of this information collection is to provide an abstract of a decision in an application under the 2007 Hague Child Support Convention. Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, gathering and maintaining the data needed, and reviewing the collection of information. This is a mandatory collection of information per 46 CFR 303.7. An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information subject to the requirements of the Paperwork Reduction Act of 1996, unless it displays a currently valid OMB control number. If you have any comments on this collection of information, please contact the ACF Reports Clearance Officer by email at info@collection@eef.hhs.gov.

¹ It is not necessary to provide a date of birth in the case of a representative.

Roles

Role Name	Function	
State Caseworker (CC)	<ul style="list-style-type: none">• View case data, applications, and forms• Create, manage, and delete data for cases, applications, and forms• Print forms for cases	<ul style="list-style-type: none">• Print resource documents• Change assigned caseworker (state's option)
State Manager (can be used as an additional function of the Caseworker role)	<ul style="list-style-type: none">• View case data, applications, and forms• Create, manage, and delete data for cases, applications, and forms• Print forms for cases	<ul style="list-style-type: none">• View, download, and print resource documents• Approve forms for applications on cases (if selected)• Manage caseload of users and teams by reassigning (if preferred)

[Child Support Portal Navigation Guide for iForms – Section 3.1]

Roles (cont'd)

Role Name	Function	
State Administrator (CS)	<ul style="list-style-type: none"> • Manage iForms users • If Teams is used, manage iForms teams • Manage state resource documents 	<ul style="list-style-type: none"> • Set up and maintain state office information • Set up and maintain state payment information • Manage state preferences for custodial party's (CP's) address, approval of forms by a manager, and authority to reassign cases
OCSS Administrator (CO)	<ul style="list-style-type: none"> • Manage Office of Child Support Services (OCSS) resource documents • Set up and maintain foreign authority information • Set up and maintain foreign Child Support Payment Service information 	<ul style="list-style-type: none"> • At the request of a state: <ul style="list-style-type: none"> – Set up and maintain payment information – Manage iForms users and teams – Set up and maintain office information.

How iForms Benefits States

- Eliminates need to program the Convention forms
- Helps caseworkers complete forms accurately; all required and optional forms are included in the package sent to the foreign Central Authority
- Reduces manual data entry
- Enhances consistency
- Creates efficient process for form review by managers
- Allows states and OCSS to obtain Convention application metrics
- Makes sure contact information for the foreign Central Authority is accurate at the OCSS level
- Supports state training by allowing states to add state-specific training materials for easy access

Module 2: State Administrator

Initial State Setup

User Acceptance Testing (UAT) environment:

- The UAT environment is recommended for caseworker and manager training.
- If your state has not previously accessed UAT, contact the OCSS Help Desk at csportal@acf.hhs.gov.
- State users new to the UAT environment will be able to register themselves.

Initial State Setup: User and State Profile

- The state determines which users will access iForms and their roles (caseworker/manager or administrator).
- The state person responsible for Child Support Portal access:
 - Assigns users their iForms roles — Caseworker (CC), Administrator (CS), or both
 - Establishes the state profile information for iForms
 - Establishes the user profile information for iForms
 - Provides the users with the state URL for the UAT environment
- For assistance, email dcse.team@acf.hhs.gov.

Note: The process for setting up users and setting up the state must be repeated in the UAT and PROD environments.

Initial State Setup – State Profile

1. Select the state's **Form Completion** option and any non-default Preference selections.
2. Select the **Central Authority Name**.
3. Add the state **Office** information.
4. Add the **Central Registry** information.
5. Add the **Payment** information.
6. Add the teams.
7. Add the iForms user profiles; see the next slide.

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

Central Authority Name Local Child Support Office Central Registry Information Payment Information Preferences

Central Authority Name

Maryland Child Support Enforcement Office 1

Save

Initial State Setup – User Profile

- For each user profile, the following information is required:
 - Name
 - iForms team (if created)
 - Languages spoken-(in addition to English)
 - iForms Office
- Add iForms users by grouping multiple selections in an Office and Team. If multiple users are selected, all are assigned the same office and team.

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

Central Authority Name Local Child Support Office Central Registry Information Payment Information Preferences

Central Authority Name

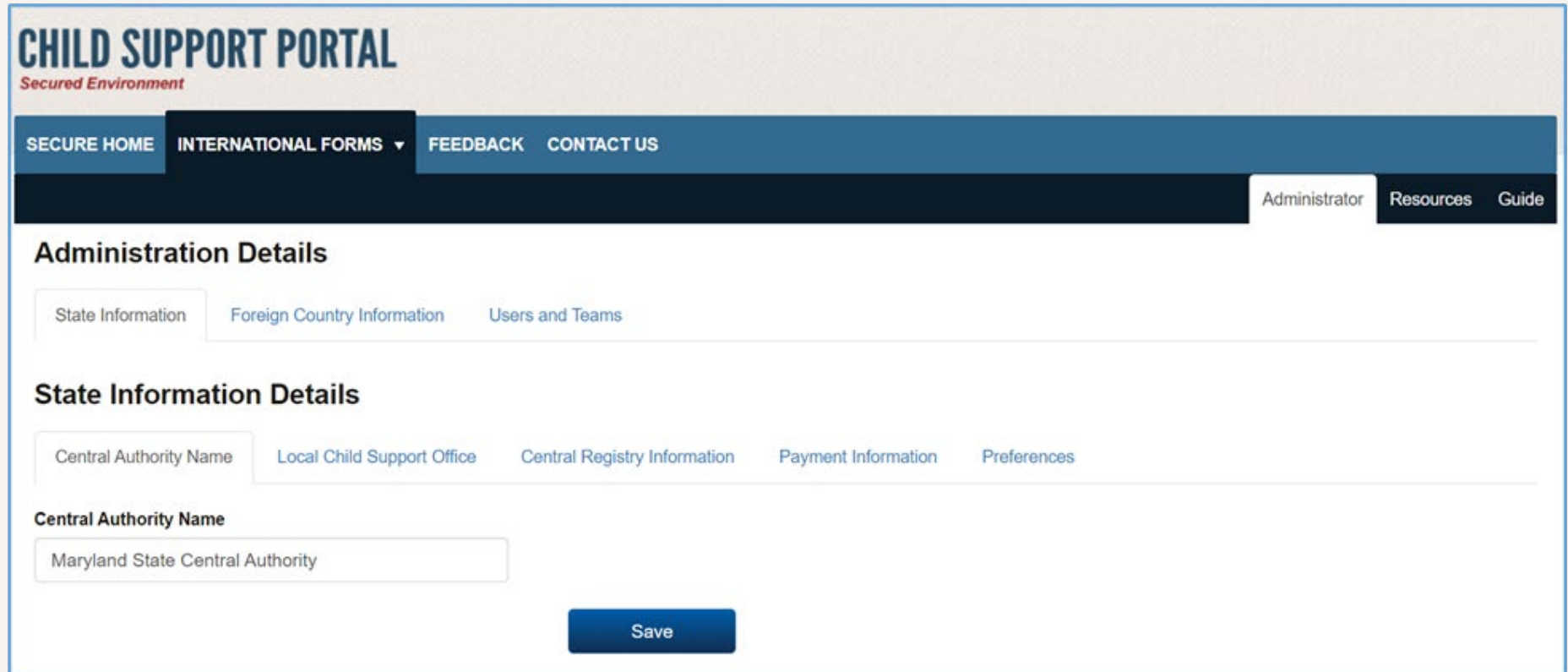
Maryland Child Support Enforcement Office 1

Save

Note: When using the multiple-selection option, skip the **Languages Spoken** attribute and address this as a follow-up edit.

State Administrator – Home Page

All functions for the State Administrator are accessed from the home page by selecting the appropriate tab.



The screenshot displays the 'CHILD SUPPORT PORTAL' interface. At the top, a header bar includes the portal name and a 'Secured Environment' indicator. Below this, a navigation menu features tabs for 'SECURE HOME', 'INTERNATIONAL FORMS' (which is currently selected), 'FEEDBACK', and 'CONTACT US'. A secondary navigation bar on the right contains links for 'Administrator', 'Resources', and 'Guide'. The main content area is titled 'Administration Details' and contains three sub-tabs: 'State Information' (selected), 'Foreign Country Information', and 'Users and Teams'. Under 'State Information Details', there are five sub-tabs: 'Central Authority Name' (selected), 'Local Child Support Office', 'Central Registry Information', 'Payment Information', and 'Preferences'. The 'Central Authority Name' section shows a text input field containing 'Maryland State Central Authority' and a blue 'Save' button.

CHILD SUPPORT PORTAL
Secured Environment

SECURE HOME INTERNATIONAL FORMS ▾ FEEDBACK CONTACT US

Administrator Resources Guide

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

Central Authority Name Local Child Support Office Central Registry Information Payment Information Preferences

Central Authority Name

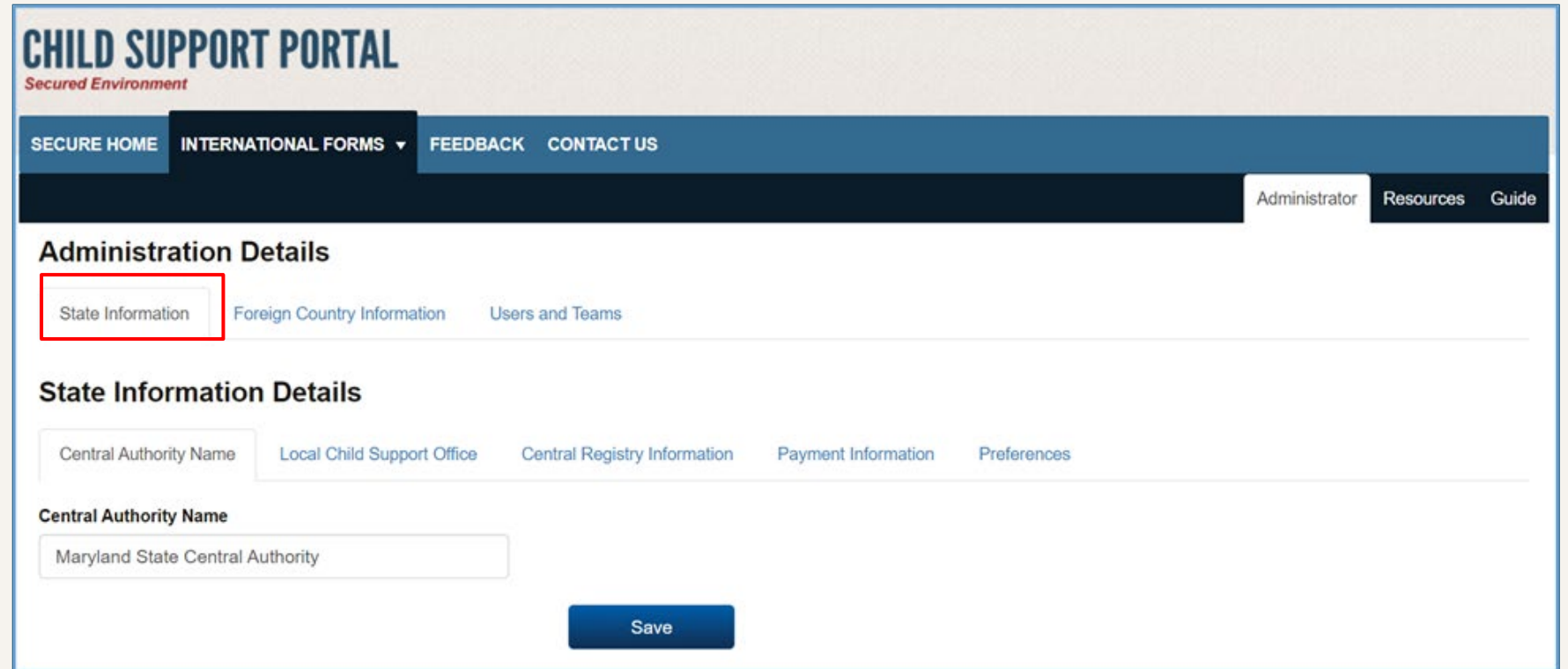
Maryland State Central Authority

Save

State Administrator – State Information

State information details can be accessed by selecting **State Information**:

- Central Authority Name
- Local Child Support Office
- Central Registry Information
- Payment Information
- Preferences



The screenshot shows the 'CHILD SUPPORT PORTAL' interface. The top navigation bar includes 'SECURE HOME', 'INTERNATIONAL FORMS' (with a dropdown arrow), 'FEEDBACK', and 'CONTACT US'. Below this is a dark blue bar with 'Administrator', 'Resources', and 'Guide'. The main content area is titled 'Administration Details' and contains three tabs: 'State Information' (highlighted with a red box), 'Foreign Country Information', and 'Users and Teams'. Under 'State Information Details', there are five sub-tabs: 'Central Authority Name' (selected), 'Local Child Support Office', 'Central Registry Information', 'Payment Information', and 'Preferences'. The 'Central Authority Name' section has a text input field containing 'Maryland State Central Authority' and a blue 'Save' button.

Central Authority Name

1. Enter the **Central Authority Name**, which assigns a name to the state central authority for use throughout the iForms application:

- Only one Central Authority Name can be identified

2. Select **Save**.

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

Central Authority Name Local Child Support Office Central Registry Information Payment Information Preferences

Central Authority Name

Maryland Child Support Enforcement Office 1

Save

Local Child Support Offices

Local child support offices create and manage office information or upload an Excel file containing the information for all state's offices.

These tasks can be performed on this page:

- Launch the Upload Office page
- Open a current office for updates
- Add a new office
- Delete an office

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

Central Authority Name Local Child Support Office Central Registry Information Payment Information Preferences

Local Child Support Offices

Offices Upload Office

Office Name	Address	City	State	Phone	Email	Action
Local Child Support Office MD2	2345 Middle River Road	Middle River	MD	5551234567	mdcseuser1@mdcse.org	Delete
Local Child Support Office (MD3)	333 Memory Lane	Annapolis	MD	4105555555	mdcseuser3@mdcse.com	Delete
Local Child Support Office	13 Uptown St	Down Town	MD	4563936563	maryland.officexxxx@leidosxxx.com	Delete

Add Office

Note: Before an office can be deleted. all active cases must be reassigned to another office.

Local Child Support Offices (cont'd)

To change information:

1. Choose the data fields that need updating.
2. Select **Save**.
3. To return to the **Local Child Support Office** list, select **Cancel**.

Edit Local Child Support Office

* Office Name

Local Child Support Office (MD3)

* Address Line1

333 Memory Lane

* City

Annapolis

* Phone Country Code

United States +1

* Fax Country Code

United States +1

* Email

mdcseuser3@mdcse.com

Address Line2

Suite 301

State

MD

* Phone Number:

4105555555

* Fax Number:

3011234567

Address Line3

3rd Floor

* Zip Code

21401

Save

Cancel

Local Child Support Offices (cont'd)

To upload a file with local office information:

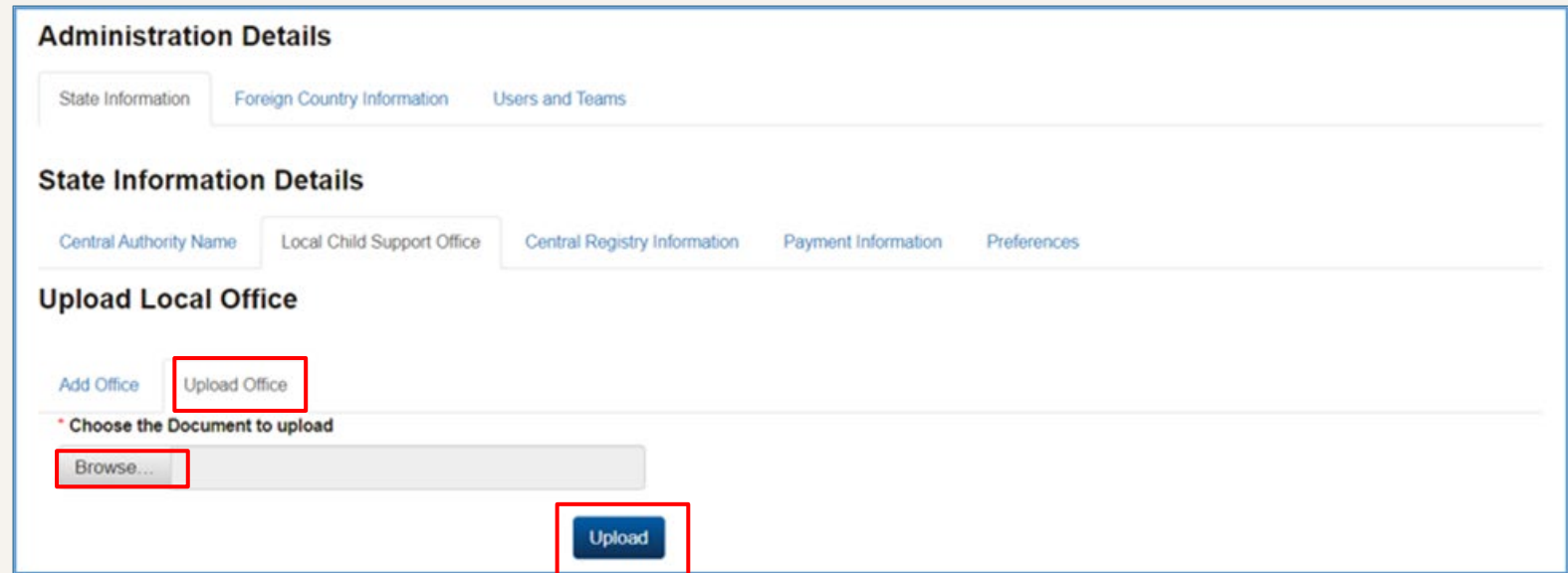
1. Make sure:

- The file is formatted like the Upload Excel file in Resources.
- The file has your state code in the name.

2. Select **Upload Office**.

3. Follow the **Browse** prompts to specify the file to upload.

4. Select **Upload**.



The screenshot shows the 'Administration Details' page in iForms. The 'State Information Details' section is active, with tabs for 'Central Authority Name', 'Local Child Support Office', 'Central Registry Information', 'Payment Information', and 'Preferences'. Under the 'Local Child Support Office' tab, there is a section titled 'Upload Local Office'. This section contains two tabs: 'Add Office' and 'Upload Office'. The 'Upload Office' tab is selected and highlighted with a red box. Below the tabs, there is a prompt '* Choose the Document to upload' followed by a 'Browse...' button, which is also highlighted with a red box. At the bottom right of the section, there is an 'Upload' button, which is highlighted with a red box.

Note: The Upload Office process is only available if no state offices exist in iForms.

Central Registry Information

To add the Central Registry information (if one does not yet exist):

1. Select the **Central Registry Information** tab.
2. Enter data in the fields shown.
3. Select **Save**.

Note: There must be one and only one Central Registry per state.

The screenshot shows a web form titled "Central Registry Information" with a navigation bar at the top containing four tabs: "Central Authority Name", "Local Child Support Office", "Central Registry Information" (highlighted with a red box), "Payment Information", and "Preferences". The form contains several input fields:

- Office Name:** A text field containing "Child Support Enforcement Central Registry of Maryla".
- Address Line1:** A text field containing "123 Constitution Blvd".
- Address Line2:** A text field with the placeholder "Enter Address Line2".
- Address Line3:** A text field with the placeholder "Enter Address Line3".
- City:** A text field containing "Annapolis".
- State:** A text field containing "MD".
- Zip Code:** A text field containing "21401".
- Phone Country Code:** A dropdown menu showing "United States +1".
- Phone Number:** A text field containing "5551234567".
- Fax Country Code:** A dropdown menu showing "United States +1".
- Fax Number:** A text field containing "5557654321".
- Email:** A text field containing "mdcseuser3@mdcse.org".

At the bottom right of the form, there is a blue "Save" button, which is also highlighted with a red box.

Payment Information

1. Select **Payment Information**.
2. Select **Send Payment To: Central Authority Payment Service** or **SDU**:
 - If **Central Authority Payment Service** is selected, details populate automatically and cannot be edited. The OCSS Administrator maintains this data.
3. Enter **Payable To**.
4. Select **Save**.

Note: SDU information is optional. Each state determines the appropriate payment methods for cases.

Administration Details

State InformationForeign Country InformationUsers and Teams

State Information Details

Central Authority NameLocal Child Support OfficeCentral Registry InformationPayment InformationPreferences

Payment Information

Send Payment To

☐ Central Authority Payment Service☒ SDU

Bank Account Information

Bank Name

Bank of America

SWIFT

0123456788

Account Holder Name

Child Support Enforcement of Maryland

Account Number

98764321

Check Information

Checks Payable To

Enter Checks Payable To

Address Line1

123 main st

Address Line2

Enter Address Line2

Address Line3

Enter Address Line3

City

Enter City

State

MD

Zip Code

Enter Zip

Save

Office of Child Support Services

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Preferences

To enter state preferences:

1. Select the **Preferences** tab.
2. Check **Require manager approval of the Forms**.
3. Check **Allow the caseworker to reassign cases to other caseworkers/Teams**.
4. Check **Allow the use of the custodial party's personal address instead of the local child support office address**.
5. Select the user name type for form completion:
 - **Person completing the form** is the default
 - If **Representative**, enter the exact character string to include on the form.

Note: By default, the first three preferences' check boxes are not checked.

Administration Details

State InformationForeign Country InformationUsers and Teams

State Information Details

Central Authority NameLocal Child Support OfficeCentral Registry InformationPayment InformationPreferences

Preferences

Require manager approval of the Forms:
☒

Allow the caseworker to reassign cases to other caseworkers/Teams:
☐

Allow the use of the custodial party's personal address instead of the local child support office address:
☒

* Choose the type of user name for form completion:

☐ Person completing the form
☐ Person approving the form
☒ Representative

Kara Zor-EI

Save

Languages

To view forms in available languages:

1. Select the **Foreign Country Information** tab.
2. Select the **Country**.
3. Select the **Languages** tab.

Note: For State Administrators, Foreign Country Primary Office information is view only.

Administration Details

State Information **Foreign Country Information** Users and Teams

Foreign Country Information Details

* Select Country

Albania ▼

Go

Languages Primary Office Additional Office

Translated forms for this country are available in these languages:
Albanian, English, English

Primary Office

To show foreign country information:

1. Select the **Foreign Country Information** tab.
2. Select the **Primary Office** tab.
3. Select the **Country**.

Note: For State Administrators, Foreign Country Primary Office information is view only.

Administration Details

[State Information](#)

[Foreign Country Information](#)

[Users and Teams](#)

Foreign Country Information Details

* Select Country

Albania

Go

[Languages](#)

[Primary Office](#)

[Additional Office](#)

Office Details

Office Name: Child Support Office of Albania

Address: Government Place, Annex Bldg. G, 2nd Floor, Tirana, AL 123456

Phone: +355 5555555555

Fax: +355 5555555555

Email: albanianuser1@csealbania.com

Contact Details

Contact Name: Joe Smith

Address: 123 Memory Lane, Apartment 202, 2nd Floor, Tirana, AL 123456

Phone: +355 5555555555

Fax: +355 5555555555

Email: albanianuser1@csealbania.com

Setup: Users and Teams

- Select the **Users and Teams** tab:
 - Member information can be edited.
 - Members can be deleted.

The screenshot shows the 'Administration Details' page with the 'Users and Teams' tab selected. It is divided into two main sections: 'Team Information' and 'User Information'.

Team Information

Team Name	Email	Phone	Team Address	Edit Members	Delete Team
local maryland team	mdcseuser3@mdcse.com	4105555555	333 Memory Lane, Suite 301, 3rd Floor, Annapolis, MD, 21401 US	Edit Members	Delete
Maryland CSE Team 1	MDCSETeam1@mdcse.com	4105555555	13 Uptown St, Down Town, MD, 28100 US	Edit Members	Delete

[Create New Team](#)

User Information

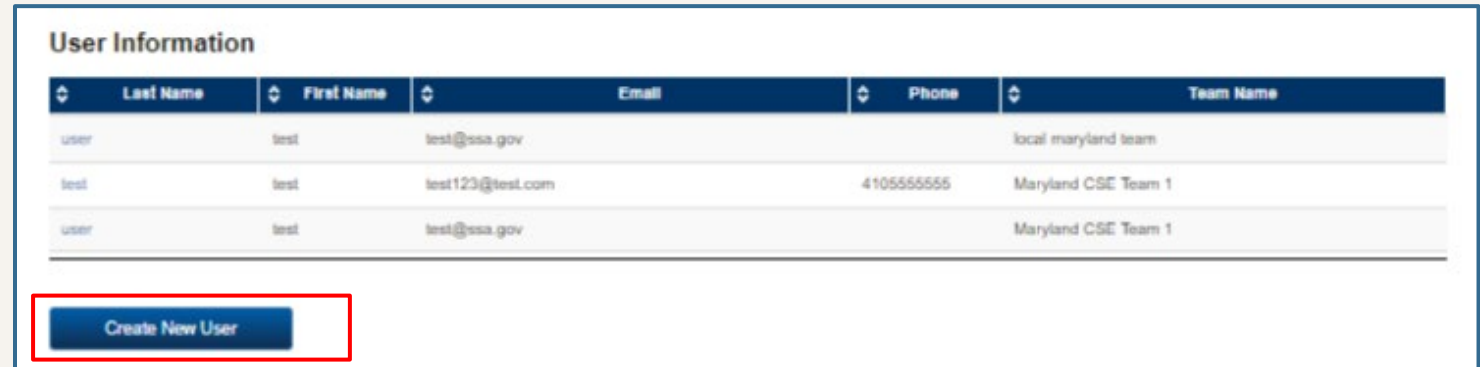
Last Name	First Name	Email	Phone	Team Name
user	test	test@ssa.gov		local maryland team
test	test	test123@test.com	4105555555	Maryland CSE Team 1
user	test	test@ssa.gov		Maryland CSE Team 1

[Create New User](#)

Create New User (Step 1 of 3)

To create a user:

1. Select the **Users and Teams** tab.
2. Select **Create New User**.



The screenshot displays a 'User Information' form. It features a table with five columns: Last Name, First Name, Email, Phone, and Team Name. The table contains three rows of user data. Below the table, a blue button labeled 'Create New User' is highlighted with a red rectangular border.

Last Name	First Name	Email	Phone	Team Name
user	test	test@ssa.gov		local maryland team
test	test	test123@test.com	4105555555	Maryland CSE Team 1
user	test	test@ssa.gov		Maryland CSE Team 1

Create New User

Note: iForms users must be selected from active Portal users.

Create New User (Step 1 of 3 cont'd)

3. Select any combination from the three fields shown.
4. Select **Search**.

Create User
Step 1 of 3: Select User

Last Name:

First Name:

Email:

Note: iForms users must be selected from active Portal users.

Create New User (Step 1 of 3 cont'd)

5. Select one or more users in the **Select User** column.

6. Select **Next**.

Create User

Step 1 of 3: Select User

Last Name:

Last Name

First Name:

First Name

Email:

Email

Search

Reset

Select User	Last Name	First Name	Email	Phone
<input checked="" type="checkbox"/>	Holmes	Sherlock	sherlock221b@baker.com	302-252-8770
<input type="checkbox"/>	Watson	John	johnwat221b@baker.com	
<input type="checkbox"/>	Lestrade	Garfield	lestrade221b@scotyard.com	
<input type="checkbox"/>	Hudson	Martha	mhudson221b@baker.com	

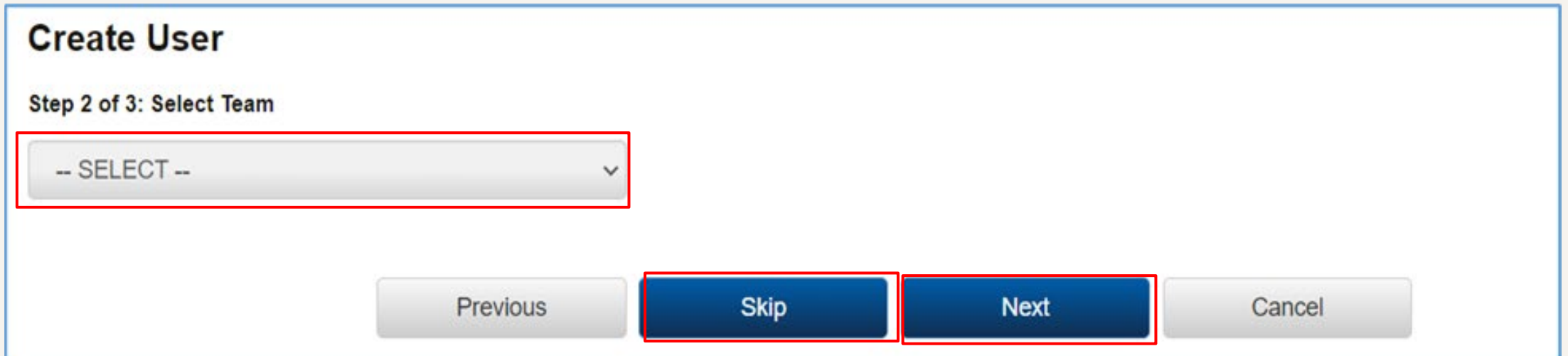
Next

Cancel

Note: iForms users are not required to be members of a team. If multiple users were selected on this page, they must all be assigned to the same office.

Create New User (Step 2 of 3)

1. Select the team the users will be a member of (optional).
2. Take one of the following steps:
 - If you selected a team, select **Next**.
 - If you selected no team, select **Skip**.



Create User

Step 2 of 3: Select Team

-- SELECT --

Previous Skip Next Cancel

Note: iForms users are not required to be members of a team. If multiple users were selected on the previous page, they must all be assigned to the same office.

Create New User (Step 3 of 3)

1. In the **Additional Languages** menu, select all the languages the user speaks.
2. If the user is a manager, select the **Role – Manager** check box.
3. In the **Office** menu, select the office the users will work for.
4. Select **Create User**.

Create User

Step 3 of 3: Finalize

Last Name	First Name	Work Phone	Work Email	Selected Languages	Additional Languages	Role - Manager
user	test		test@ssa.gov	None	None selected	<input type="checkbox"/>

Team Name:
Maryland Local Authority Test

iForms Phone:
5551234567

iForms Email:
mdcseuser1@mdcse.org

*** Office**
-- SELECT --

Previous

Create User

Cancel

Edit User

1. On the **Administrator** tab, select **Users and Teams**.
2. Select the **Last Name** of the user from the **User Information** list.
3. Choose the data fields that need updating.
4. Select **Save**.

Edit User

User Name: test user	* Phone Number: 5557654321	* Email test@ssa.gov
Role - Manager: <input type="checkbox"/>	* Office: Local Child Support Office	Address: 13 Uptown St, Down Town, MD, 28100, US
Selected Languages: French	Additional Languages: French	

Save

Cancel

Create Team

1. On the **Administrator** tab, select **Users and Teams**.
2. Select **Create New Team**.
3. Enter the **Team Name**.
4. Select the local child support **Office** for the team.
5. Select **State Phone** and, if **Custom Phone** is selected, enter the phone number associated with the team.
6. Select **State Email** and, if **Custom Email** is selected, enter the email address associated with the team.
7. Select **Save**.

The screenshot shows the 'Create Team' form interface. It includes a title 'Create Team' at the top. Below the title, there are two required fields marked with an asterisk: '* Team Name:' followed by a text input field containing the placeholder 'Enter Team Name', and '* Office:' followed by a dropdown menu showing '-- SELECT --'. Below these, there are two sets of radio buttons. The first set has 'State Phone' (selected) and 'Custom Phone'. The second set has 'State Email' (selected) and 'Custom Email'. At the bottom right, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

Edit Team

1. In the **Team Name** field, select the team to edit.
2. Choose the data fields that need updating.

3. Select **Save**.

Note: Some data, such as the address of the state office, may not be editable. This information must be changed on the **Local Child Support Office** tab.

Edit Team

Team Name:

*** Office:**

Address:
13 Uptown St, Down Town, MD, 28100, US

☐ State Phone ☒ Custom Phone

*** Phone Number:**

☐ State Email ☒ Custom Email

*** Email**

Delete Team / Edit Members

1. Select the **Users and Teams** tab:

- To delete a team, select **Delete**.
iForms prompts for a delete confirmation.
- To edit members:
 - i. Select **Edit Members**.
 - ii. Make the updates.
 - iii. Select **Save**.

Note: All active cases must be reassigned before a team can be deleted.

Administration Details

State Information Foreign Country Information **Users and Teams**

Team Information

Team Name	Email	Phone	Team Address	Edit Members	Delete Team
local maryland team	mdcseuser3@mdcse.com	4105555555	333 Memory Lane, Suite 301, 3rd Floor, Annapolis, MD, 21401 US	Edit Members	Delete
Maryland CSE Team 1	MDCSETeam1@mdcse.com	4105555555	13 Uptown St, Down Town, MD, 28100 US	Edit Members	Delete

Create New Team

User Information

Last Name	First Name	Email	Phone	Team Name
user	test	test@ssa.gov		local maryland team
test	test	test123@test.com	4105555555	Maryland CSE Team 1
user	test	test@ssa.gov		Maryland CSE Team 1

Create New User

[Child Support Portal Navigation Guide for iForms – Section 3.5.1.8]

Add / Edit / Delete State Resource

1. Select the **State Resources** tab.
2. Select the state.
3. Take one of these steps:
 - To add a resource, select **Add State Resource**:
 - i. Enter **Resource Name** and **Resource Description**.
 - ii. Add a resource using one of the following methods:
 - Direct link to the current URL location of the resource
 - Upload a file to iForms that users can access
 - iii. Select **Save**.

The screenshot shows the iForms 'Resources' page. At the top, there is a navigation bar with links: SECURE HOME, INTERNATIONAL FORMS (with a dropdown arrow), FEEDBACK, and CONTACT US. On the right side of the navigation bar, there is a 'COMMUNICATION CENTER' section with links for Administrator, Resources, and Guide. Below the navigation bar, the 'Resources' section is active, showing tabs for Application Checklist, 2007 Convention, Foreign Country, and State Resources. The 'State Resources' tab is selected. Below the tabs, there is a table with three columns: Resource, Description, and Action. The table contains one row with 'Test Resource 1' in both the Resource and Description columns. In the Action column, there are two buttons: 'Edit' (blue) and 'Delete' (red). Below the table, there is a button labeled 'Add State Resource'.

Resource	Description	Action
Test Resource 1	Test Resource 1	Edit Delete

[Add State Resource](#)

Add / Edit / Delete State Resource (cont'd)

- To edit a resource's information, select **Edit**.
- To delete a resource, select **Delete**.

Add State Resource

* Resource Name

* Resource Description

* Choose Resource Type

☐ Document ☐ Link

Module 3: OCSS Administrator

OCSS Administrator – Home Page

All OCSS Administrator functions can be accessed from the home page by selecting the appropriate tab.

Administration Details

State Information

Foreign Country Information

Users and Teams

State Information Details

* Select State

Wisconsin

Go

Central Authority Name

Local Child Support Office

Central Registry Information

Payment Information

Preferences

Central Authority Name

Central Authority Name

Save

Foreign Country Information – Languages

To change languages:

1. Select the **Foreign Country** tab.
2. In the **Select Country** field, choose the foreign country.
3. Select **Go**.
4. Select the **Languages** tab, which displays the available languages.
5. To add or remove languages, select **Add/Remove Languages**.
6. Select **Save**.

Note: For State Administrators, Foreign Country Primary Office information is view only.

The screenshot shows the 'Administration Details' page with three tabs: 'State Information', 'Foreign Country Information' (selected), and 'Users and Teams'. Below the tabs is the 'Foreign Country Information Details' section. It features a dropdown menu labeled '* Select Country' with 'France' selected, a 'Go' button, and a 'Languages' tab (selected) with 'Primary Office' and 'Additional Office' sub-tabs. Below the 'Languages' tab, it states 'Translated forms for this country are available in these languages: English, French'. To the right, there is an 'Add/Remove Languages' dropdown showing '2 selected'. At the bottom right, there is a 'Save' button. Red boxes highlight the 'Select Country' dropdown, the 'Go' button, and the 'Save' button.

OCSS Administrator – Foreign Country Information – Primary Office

1. Select the **Foreign Country Information** tab.
2. Select **Country**.
3. Select the **Primary Office** tab. Edit this Information as needed.

Note: A foreign country can only have one Primary Office. This will usually be the foreign Central Authority.

Foreign Country Information Details

* Select Country
France

Languages **Primary Office** Additional Office

Office Details

* Office Name
France Primary office

* Address Line1
Address Lane 1 Test

Address Line2
Enter Address Line2

Address Line3
Enter Address Line3

* City
Test City

Province
Enter Province Name

* Postal Code
23456

* Phone Country Code
France +33

* Phone Number:
123456789

* Fax Country Code
France +33

* Fax Number:
987654321

* Email
frcseuser1@frcse.com

Contact Details

* Last Name
Lname

* First Name
Fname

* Address Line1
TestAddresslane1

Address Line2
Enter Address Line2

Address Line3
Enter Address Line3

* City
Test city

Province
Enter Province Name

* Postal Code
123456

* Phone Country Code
France +33

* Phone Number:
123456789

* Fax Country Code
France +33

* Fax Number:
987654321

* Email
frcseuser1@frcse.com

Foreign Country Information – Add Office

Some foreign countries will manage cases through multiple offices.

To add:

1. Select the **Foreign Country Information** tab.
2. Select the **Foreign Country**.
3. Select the **Additional Offices** tab.
4. Select **Add Office** and complete the information.
5. Select **Save**.

Administration Details

State Information **Foreign Country Information** Users and Teams

Foreign Country Information Details

* Select Country
France

Go

Languages Primary Office **Additional Office**

Office Name	Address	City	Country	Phone	Email	Action
Child Support Enforcement of Paris 2	345 Rue de Rivoli	Paris	France	5551234567	cseuser1@csefr.com	Delete

Add Office

State Information

State information details can be accessed by selecting the **State Information** tab:

1. On the **Select State** menu, select the state.
2. Select **Go**.

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

* Select State

Wisconsin

Go

Central Authority Name Local Child Support Office Central Registry Information Payment Information Preferences

Central Authority Name

Central Authority Name

Save

Central Authority Name

The Central Authority Name section allows a name to be assigned to the state Central Authority to use throughout the iForms application.

1. In the **Central Authority Name** field, enter the Central Authority name. Only one Central Authority name can be identified.
2. Select **Save**.

The screenshot displays the 'Administration Details' section of the iForms application. It features a tabbed interface with 'State Information', 'Foreign Country Information', and 'Users and Teams'. The 'State Information' tab is active, showing a 'Select State' dropdown menu with 'Wisconsin' selected and a 'Go' button. Below this is another set of tabs: 'Central Authority Name', 'Local Child Support Office', 'Central Registry Information', 'Payment Information', and 'Preferences'. The 'Central Authority Name' tab is selected, revealing a text input field labeled 'Central Authority Name' and a 'Save' button. Both the text field and the 'Save' button are highlighted with red rectangular boxes.

Local Child Support Offices

This section allows you to create or manage office information or upload an Excel file containing the information for all a state's offices.

You can:

- Launch the Upload Office page
- Open a current office for updates
- Add a new office
- Delete an office

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

* Select State
Alaska Go

Central Authority Name Local Child Support Offices Central Registry Information Payment Information Preferences

Local Child Support Offices

Offices Upload Office

Office Name	Address	City	State	Phone	Email	Action
Child Support Office of Anchorage	123 Memory Lane	Anchorage	AK	5551234567	AKUser1@akcse.com	Delete

Add Office

Note: Before an office can be deleted, all its active cases must be reassigned.

Local Child Support Offices (cont'd)

To change any information:

1. Select the data fields that need updating.
2. Select **Save**.
3. To exit the Manage Offices page and return to the **Local Child Support Office** list, select **Cancel**.

Edit Local Child Support Office

* Office Name Local Child Support Office (MD3)		
* Address Line1 333 Memory Lane	Address Line2 Suite 301	Address Line3 3rd Floor
* City Annapolis	State MD	* Zip Code 21401
* Phone Country Code United States +1	* Phone Number: 4105555555	
* Fax Country Code United States +1	* Fax Number: 3011234567	
* Email mdcseuser3@mdcse.com		
<div>Save</div> <div>Cancel</div>		

Local Child Support Offices (cont'd)

To upload a file:

1. Make sure:

- The data is in the format of the Upload Excel file in Resources.
- The file name contains your state code.

2. Select the **Upload Office** tab.

3. Select **Browse**; follow the dialog box prompts to identify the file to upload.

4. Select **Upload**.

The screenshot displays the 'Administration Details' page with three tabs: 'State Information', 'Foreign Country Information', and 'Users and Teams'. The 'State Information' tab is active, showing 'State Information Details' with a dropdown menu for 'Select State' set to 'Arizona' and a 'Go' button. Below this are five sub-tabs: 'Central Authority Name', 'Local Child Support Office', 'Central Registry Information', 'Payment Information', and 'Preferences'. The 'Local Child Support Office' sub-tab is active, showing 'Upload Local Office' details. It includes two sub-tabs: 'Offices' and 'Upload Office', with 'Upload Office' selected. Under 'Upload Office', there is a section '* Choose the Document to upload' with a 'Browse...' button and an 'Upload' button. Red boxes highlight the 'Upload Office' sub-tab, the 'Browse...' button, and the 'Upload' button.

Note: The Upload Office process is only available if no state offices were created.

Central Registry Information

State Information Details

* Select State
Arizona

Go

Central Authority Name

Local Child Support Office

Central Registry Information

Payment Information

Preferences

Central Registry Information

* Office Name
Office Name

* Address Line1
Enter Address Line1

Address Line2
Enter Address Line2

Address Line3
Enter Address Line3

* City
Enter City

* State
Enter State Code

* Zip Code
Enter Zip

* Phone Country Code
United States +1

* Phone Number:
Enter Phone Number

* Fax Country Code
United States +1

* Fax Number:
Enter Fax Number

* Email
username@company.com

Save

Office of Child Support Services

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Central Registry Information (cont'd)

To add the Central Registry information if one does not yet exist:

1. Select the **Central Registry Information** tab.
2. Enter the **Central Registry, Name, Address Line1, City, State, and Zip Code.**
3. Enter the **Phone Country Code** and **Phone Number.**
4. Enter the **Fax Country Code** and **Fax Number.**
5. Enter the **Email** address.
6. Enter the **Contact Person Last Name** and **Contact Person First Name.**
7. Select **Save.**
8. To exit the Central Registry Information workflow, select **Cancel.**

Note: There must be one and only one Central Registry per state.

Payment Information

1. Select **Payment Information**.
2. Select **Central Authority Payment Service (CAP)** or **State Disbursement Unit (SDU)**.
3. Enter the **Payable To** information.
4. Select **Save**.
5. To exit, select **Cancel**.

Note: **SDU** fields are optional. Each state determines the appropriate payment methods for cases.

State Information Details

* Select State

Alaska

Go

Central Authority Name

Local Child Support Office

Central Registry Information

Payment Information

Preferences

Payment Information

* Send Payment To

☒ Central Authority Payment Service (CAP) ☐ SDU

Bank Account Information

* Bank Name

Orrstown Bank

* SWIFT

9876543210

* Account Holder Name

Account Holder Name

* Account Number

123456788

Check Information

* Checks Payable To

Maryland Office of Child Support

* Address Line1

123 Main St

Address Line2

AL2

Address Line3

AL3

* City

Annapolis

* State

MD

* Zip Code

21401

Save

Office of Child Support Services

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Preferences

To set preferences:

1. Select **Preferences**.
2. Check **Require manager approval of the Forms**.
3. Check **Allow the caseworker to reassign cases to other caseworkers/Teams**.
4. Check **Allow the use of the custodial party's personal address instead of the local child support office address**.
5. Select user name type for form completion:
 - **Person completing the form** is the default.
 - If **Representative**, enter the exact character string.
6. Select **Save**.

The screenshot shows the 'Administration Details' page with a navigation bar containing 'State Information', 'Foreign Country Information', and 'Users and Teams'. Below this is the 'State Information Details' section with a 'Select State' dropdown menu set to 'Montana' and a 'Go' button. A secondary navigation bar includes 'Central Authority Name', 'Local Child Support Office', 'Central Registry Information', 'Payment Information', and 'Preferences' (which is highlighted with a red box). The 'Preferences' section contains three settings: 'Require manager approval of the Forms' (checked), 'Allow the caseworker to reassign cases to other caseworkers/Teams' (checked), and 'Allow the use of the custodial parent's personal address instead of the local child support office address' (unchecked). Below these is a section for 'Choose the type of user name for form completion' with three radio button options: 'Person completing the form' (selected), 'Person approving the form', and 'Representative'. A 'Save' button is located at the bottom right of the preferences section, also highlighted with a red box.

Administration Details

State Information Foreign Country Information Users and Teams

State Information Details

* Select State

Montana Go

Central Authority Name Local Child Support Office Central Registry Information Payment Information **Preferences**

Preferences

Require manager approval of the Forms:

☒

Allow the caseworker to reassign cases to other caseworkers/Teams:

☒

Allow the use of the custodial parent's personal address instead of the local child support office address:

☐

* Choose the type of user name for form completion:

☒ Person completing the form

☐ Person approving the form

☐ Representative

Save

OCSS Administrator – Users and Teams

- Select the **Users and Teams** tab:
 - Members can be edited and deleted.

Administration Details

State InformationForeign Country InformationUsers and Teams

Team Information

Team Name	Email	Phone	Team Address	Edit Members	Delete Team
local maryland team	mdcseuser3@mdcse.com	4105555555	333 Memory Lane, Suite 301, 3rd Floor, Annapolis, MD, 21401 US	Edit Members	Delete
Maryland CSE Team 1	MDCSETeam1@mdcse.com	4105555555	13 Uptown St, Down Town, MD, 28100 US	Edit Members	Delete

Create New Team

User Information

Last Name	First Name	Email	Phone	Team Name
user	test	test@ssa.gov		local maryland team
test	test	test123@test.com	4105555555	Maryland CSE Team 1
user	test	test@ssa.gov		Maryland CSE Team 1

Create New User

Create New User (Step 1 of 3)

- 1. Select **Users and Teams**.
- 2. Select **Create New User**.

User Information

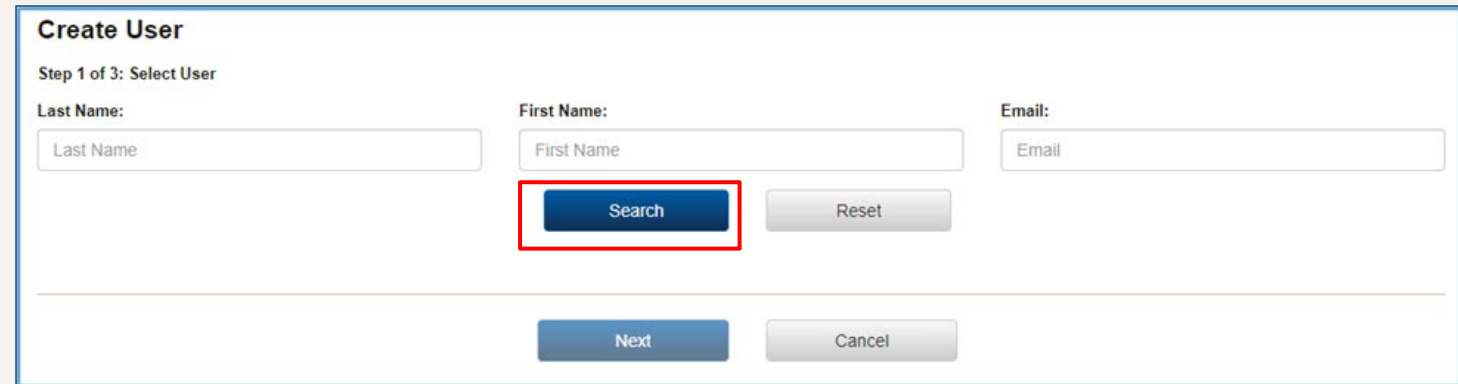
Last Name	First Name	Email	Phone	Team Name
user	test	test@ssa.gov		local maryland team
test	test	test123@test.com	4105555555	Maryland CSE Team 1
user	test	test@ssa.gov		Maryland CSE Team 1

Create New User

Note: iForms users can be selected from active Portal users.

Create New User (Step 1 of 3 cont'd)

3. Select **Users and Teams**.
4. Select **Create New User**.
5. Select any combination from the three data fields shown.
6. Select **Search**.



Create User
Step 1 of 3: Select User

Last Name:

First Name:

Email:

Search

Note: iForms users can be selected from active Portal users.

Create New User (Steps 2 and 3 of 3)

1. Select the team the user will be a member of (optional).
2. Take one of the following steps:
 - If a team is selected, select **Next**.
 - If no team was selected, select **Skip**.

Create User

Step 2 of 3: Select Team

-- SELECT --

Previous Skip Next Cancel

Create New User (Steps 2 and 3 of 3 cont'd)

3. Select the office the user will work for.

4. Select **Create User**.

Note: iForms users are not required to be members of a team.

Create User

Step 3 of 3: Finalize

Last Name	First Name	Work Phone	Work Email	Selected Languages	Additional Languages	Role - Manager
officeofchildsupportldaptest	officeofchildsupportldaptest		test@california.com	None	None selected	<input type="checkbox"/>

Office

-- SELECT --

Previous

Create User

Cancel

Create New User (Step 3 of 3 cont'd)

1. Select all the languages spoken by the user.

2. Select whether the user is a manager.
3. Select the office the user will work for.

4. Select **Create User**.

Create User

Step 3 of 3: Finalize

Last Name	First Name	Work Phone	Work Email	Selected Languages	Additional Languages	Role - Manager
user	test		test@ssa.gov	None	None selected	<input type="checkbox"/>

Team Name:

Maryland Local Authority Test

iForms Phone:

5551234567

iForms Email:

mdcseuser1@mdcse.org

* Office

-- SELECT --

Previous

Create User

Cancel

Edit New User

1. On the **Administrator** tab, select **Users and Team**.
2. Select the **Last Name** of the user from the **User Information** list.
3. Choose the data fields that need updating.
4. Select **Save**.

Edit User

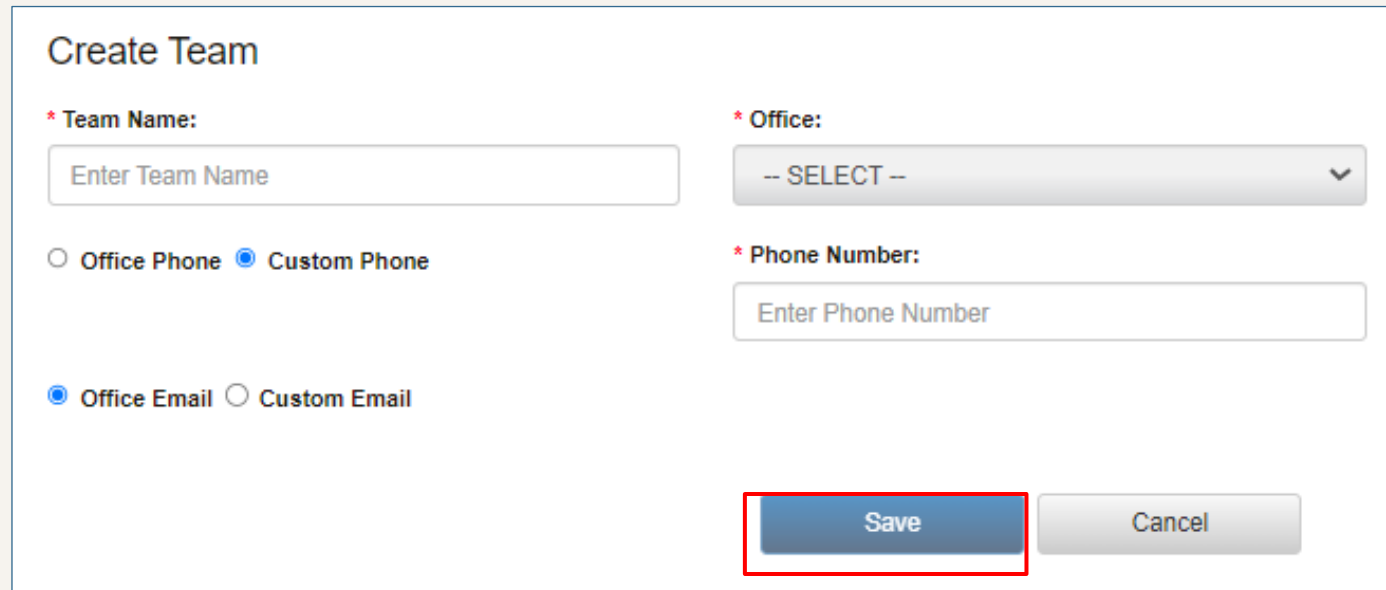
User Name: test user	* Phone Number: 5557654321	* Email test@ssa.gov
Role - Manager: <input type="checkbox"/>	* Office: Local Child Support Office	Address: 13 Uptown St, Down Town, MD, 28100, US
Selected Languages: French	Additional Languages: French	

Save

Cancel

Create Team

1. On the **Administrator** tab, select **Users and Teams**.
2. Select **Create New Team**.
3. Enter the team's name.
4. Select the local child support office for the team.
5. Select **State Phone** and, if **Custom Phone** is selected, enter the phone number associated with the team.
6. Select **State Email** and, if **Custom Email** is selected, enter the email address associated with the team.
7. Select **Save**.



The screenshot shows a 'Create Team' form with the following fields and options:

- * Team Name:** A text input field with the placeholder 'Enter Team Name'.
- * Office:** A dropdown menu with the placeholder '-- SELECT --' and a downward arrow.
- * Phone Number:** A text input field with the placeholder 'Enter Phone Number'.
- Radio buttons for Phone:** ☐ Office Phone, ☒ Custom Phone.
- Radio buttons for Email:** ☒ Office Email, ☐ Custom Email.
- Buttons:** A blue 'Save' button and a grey 'Cancel' button. The 'Save' button is highlighted with a red rectangular box.

Edit Team

1. In the **Team Name** field, select the team.
2. Choose the data fields that need updating.

3. Select **Save**.

Note: Some data, such as the state office address, cannot be edited here. Change it on the **Local Child Support Office** tab.

Edit Team

Team Name:

*** Office:**

Address:
13 Uptown St, Down Town, MD, 28100, US

☐ Office Phone ☒ Custom Phone

☐ Office Email ☒ Custom Email

*** Phone Number:**

*** Email**

Delete Team / Edit Members

Select-Users and Teams:

- To delete a team, select **Delete**.

Note: All active cases must be reassigned before a team can be deleted.

- To edit members:
 - Select **Edit Members**.
 - Make the updates.
 - Select **Save**.

Administration Details

State InformationForeign Country InformationUsers and Teams

Team Information

Team Name	Email	Phone	Team Address	Edit Members	Delete Team
local maryland team	mdcseuser3@mdcse.com	4105555555	333 Memory Lane, Suite 301, 3rd Floor, Annapolis, MD, 21401 US	Edit Members	Delete
Maryland CSE Team 1	MDCSETeam1@mdcse.com	4105555555	13 Uptown St, Down Town, MD, 28100 US	Edit Members	Delete

Create New Team

User Information

Last Name	First Name	Email	Phone	Team Name
user	test	test@ssa.gov		local maryland team
test	test	test123@test.com	4105555555	Maryland CSE Team 1
user	test	test@ssa.gov		Maryland CSE Team 1

Create New User

OCSS Administrator – Add / Manage Resources

1. Select **Resources**.
2. Select the applicable resource.
The OCSS Administrator manages the 2007 Hague Convention Application Checklists, 2007 Convention general resources, Foreign Country resources, and if requested, the state's resources.
3. Select **Add**.

The screenshot displays the OCSS Administrator web application. At the top, a navigation bar includes links for 'SECURE HOME', 'INTERNATIONAL FORMS', 'FEEDBACK', and 'CONTACT US'. On the right, a 'COMMUNICATION CENTER' section contains links for 'Administrator', 'Resources', and 'Guide'. The 'Resources' link is highlighted with a red box. Below the navigation bar, the 'Resources' section is active, with a red box around its title. It features a tabbed interface with 'Application Checklist', '2007 Convention', 'Foreign Country', and 'State Resources'. The 'Application Checklist' tab is selected. Below the tabs is a table with three columns: 'Application Type', 'Checklist Name', and 'Action'. The table lists three items: 'Establishment - incoming', 'Enforcement - outgoing', and 'Modification - incoming'. Each item has a 'Delete' button in the 'Action' column. At the bottom left of the 'Resources' section, there is a blue 'Add Checklist' button, also highlighted with a red box.

Application Type	Checklist Name	Action
Establishment - incoming	Checklist - Establishment - incoming	Delete
Enforcement - outgoing	Checklist - Enforcement - outgoing	Delete
Modification - incoming	Checklist - Modification - incoming	Delete

Application Checklists

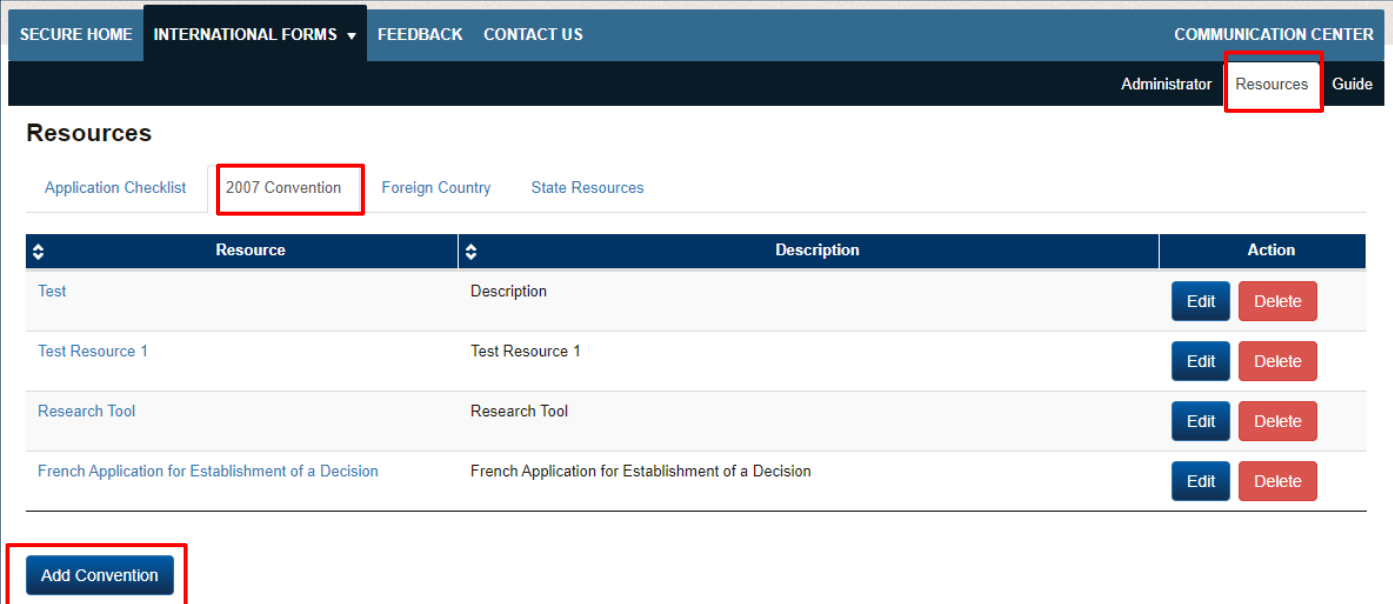
To upload:

1. Select **Resources**.
2. Select **Application Checklist**.
3. Select **Application Type**.
4. Select **Browse**; follow the dialog box workflow to identify the file to upload.
5. Take one of these steps:
 - To upload the file, select **Upload Checklist**.
 - To exit the upload process, select **Cancel**.

The screenshot shows a web interface for uploading an application checklist. At the top is a navigation bar with links: SECURE HOME, INTERNATIONAL FORMS (with a dropdown arrow), FEEDBACK, and CONTACT US. On the right side of the navigation bar is the COMMUNICATION CENTER with links for Administrator, Resources (highlighted with a red box), and Guide. Below the navigation bar is the main content area titled 'Upload Application Checklist'. It contains two sections: '* Application Type' with a dropdown menu showing 'Modification - incoming' (highlighted with a red box), and '* Choose the Document to upload' with a 'Browse...' button and a text field containing 'Checklist - Modification - incoming.docx' (both highlighted with a red box). Below these fields are two buttons: 'Upload Checklist' (highlighted with a red box) and 'Cancel'.

Add Resources – 2007 Convention

1. Select **Resources**.
2. Select **2007 Convention**.
3. If the resource is stored:
 - a. Select **Document**.
 - b. Follow the **Browse** dialog box's workflow to specify the file to upload.
 - c. Take one of these steps:
 - To upload the file, select **Open**.
 - To exit, select **Cancel**.
4. If the resource is a link:
 - a. Select **Link**.
 - b. Enter the **URL** of the resource location.



Resource	Description	Action
Test	Description	Edit Delete
Test Resource 1	Test Resource 1	Edit Delete
Research Tool	Research Tool	Edit Delete
French Application for Establishment of a Decision	French Application for Establishment of a Decision	Edit Delete

[Add Convention](#)

- c. To add the URL, select **Open**.
- d. To exit, select **Cancel**.

When the URL is successfully added, a green banner displays.

Add / Edit / Delete State Resource

1. Select **State Resources** tab.
2. In the **Select State** menu, select the state.
3. Take one of these steps:
 - To add a resource, select **Add State Resource**:
 - i. Add a resource using one of the following methods:
 - Link to the current URL location of the resource
 - Upload a file to iForms that users can access
 - ii. Select **Resource Type**.
 - iii. Select **Save**.

The screenshot shows the 'Resources' page in the iForms application. The top navigation bar includes 'SECURE HOME', 'INTERNATIONAL FORMS', 'FEEDBACK', 'CONTACT US', and 'COMMUNICATION CENTER'. The user is logged in as 'Administrator' and is viewing the 'Resources' section. The 'Resources' tab is selected, and the 'State Resources' sub-tab is active. A 'Select State' dropdown menu is open, showing 'Maryland' as the selected state. A 'Go' button is next to the dropdown. Below the dropdown is a table with columns 'Resource', 'Description', and 'Action'. The table contains one row with the resource 'JL0001_20230201_SYT.xlsx' and description 'Data Analytics Resources'. The 'Action' column for this row has 'Edit' and 'Delete' buttons. At the bottom of the page, there is an 'Add State Resource' button.

Resource	Description	Action
JL0001_20230201_SYT.xlsx	Data Analytics Resources	Edit Delete

[Add State Resource](#)

Add / Edit / Delete State Resource (cont'd)

- To edit resource information, select **Edit**.
- To delete a resource, select **Delete**.

Add State Resource

*** Resource Name**

*** Resource Description**

*** Choose Resource Type**

☐ Document ☐ Link

Save

Cancel

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